

Evergreen Project Plan Instructions

The following table provides a brief description of the documentation that will be required of successful HTF applicants prior to contracting. Features required to meet the minimum threshold level in successful applications will be verified by a third party during construction, including all applicable mandatory criteria and optional points totaling 40 for rehabilitation projects or 50 for new construction projects. Project sponsors must provide information that demonstrates a full understanding of each criterion, its requirements, and how it will be applied or installed in the project. This information constitutes the Evergreen Project Plan. This plan will need to be submitted and approved prior to disbursement of funds.

Please note the following:

- In order to successfully complete the Evergreen Project Plan, you will need to refer directly to the Evergreen Criteria. The information in the first 2 columns below is a summary and does not include all of the detail that you need to address.
- Project sponsors need to include all applicable mandatory and optional criteria in the construction cost estimate and in the project specifications. Identify Evergreen features in these documents so that there is assurance that they have been included.
- Except in Criteria where there is a range of points offered, there is no graduated point allowance for less than full compliance with the provisions and intent of a given Criterion.
- The project sponsor must submit a site map for each of Criteria 2-1, 2-2, 2-3, 2-6, 2-7, 6-4, 6-5, & 6-7 that clearly indicates the parameters of each criterion claimed.
- Infill is a site with utilities adjacent that is surrounded by developed parcels and bordering streets. You can claim optional infill points with Criteria 2-1 and 2-5 only.
- Criteria 3-3 and 4-3 are mutually exclusive – you can choose 3-3 or 4-3, not both.
- Criteria 5-7 and 5-17 are also mutually exclusive – you can choose 5-7 or 5-17, not both.
- If you choose 5-8, you cannot also choose 5-14, 5-15, or 5-16.
- For fixtures, appliances, or other components, it is expected that all components of a given type in the entire project will be equal to or more sustainable than the specified level of performance submitted in this project plan.
- Criteria explained in **bold (27 total)** require separate attachments **labeled by criteria number and collated numerically**.
- The Owner's Manual (Criterion 8-1) and the Occupant's Manual (Criterion 8-2) are part of the Management Plan that is submitted to the Contract Manager, and are not submitted with the Evergreen Project Plan unless rehabilitation is done with tenants in place without relocation.
- Homeowner and New Resident Orientation (Criterion 8-3) will be verified by a CTED monitor at the beginning of operations.
- **All other items should be explained in the "Intended Method to Satisfy" column using only critical words and specs to limit the number of words for each entry.**

The following table provides guidance on how to complete the “Intended Method To Satisfy” column of the Evergreen Project Plan.

Criteria that apply to both New Construction and Rehab:

Criteria that apply to Rehabilitation Only:

Criteria that apply to New Construction Only:

Mandatory Criteria (not all apply to every project):



Criterion	Attributes and Limitations	Intended Method To Satisfy
1-1 Green Development Plan	Mandatory	Attach integrated design plan with the following identified: the sustainable development goals and intended outcomes, a description of the integrated design process including documentation, the name, role, and telephone number of each member of the development team, and an explanation about how the sustainable features will be correctly implemented and installed by all people working on the project.
2-1 Smart Site Location – Proximity to Existing Development	New Construction – Optional – 5 Points	Attach Site & Vicinity Map with explanation. Clearly label and indicate on the map the areas specific to this criterion.
2-2 Smart Site Location – Protecting Environmental Resources	New Construction – Optional – 5 Points No Infill	Attach Site & Vicinity Map with explanation. Clearly label and indicate on the map the areas specific to this criterion.
2-3 Smart Site Location – Proximity to Services	New Construction – Optional – 5 Points No Infill	Attach Site & Vicinity Map with explanation. Clearly label and indicate on the map the areas specific to this criterion.
2-4 Compact Development	New Construction – Optional – 5 Points No Infill	Attach architect’s density calculation and statement of correctness.
2-5 Compact Development	New Construction – Optional – 5 Points	Attach architect’s density calculation and statement of correctness.
2-6 Walkable Neighborhoods – Sidewalks and Pathways	Mandatory	Attach Site & Vicinity Map with explanation. Clearly label and indicate on the map the areas specific to this criterion.
2-7 Walkable Neighborhoods – Connections to Surrounding Neighborhood	Optional – 5 Points	Attach Site & Vicinity Map with explanation. Clearly label and indicate on the map the areas specific to this criterion.
2-8 Smart Site Location – Passive Solar Heating/Cooling	New Construction – Optional – 5 Points	Attach software analysis.
2-9 Smart Site Location – Grayfield, Brownfield or Adaptive	Optional – 10 Points	Provide description and explanation here that confirms the type of site.

Reuse Site		
2-10 Transportation Choices	Optional – Up to 10 Points	Attach context Map and public transportation schedule. Clearly label and indicate on the map the areas specific to this criterion.
3-1 Environmental Remediation	Mandatory	Only attach ESA Phase 1 with additional limited surveys if they were not submitted with the HTF application.
3-2 Erosion and Sedimentation Control	Mandatory	Specify here whether EPA or local controls are more stringent and the actual erosion measures that will specifically be used on the site.
3-3 Landscaping	Optional – 5 Points	Attach a landscape plan showing native plantings including trees, shrubs, and grass and their relation to the buildings. No irrigation system is allowed if claiming this criterion.
3-4 Surface Water Management	Optional – 5 Points	Describe design features here that minimize run-off and hold water on the site.
3-5 Storm Drain Labels	Optional – 2 Points	State your commitment to label here.
4-1 Water-Conserving Appliances and Fixtures	Mandatory	Specify flow rates here for applicable fixtures that will be installed. Have approved contractor submittals on the job site. Do not send in product literature or spec sheets.
4-2 Water-Conserving Appliances and Fixtures	Optional – 2 Points Each Up to 8 Points	Specify flow rates here for applicable fixtures that will be installed. Have approved contractor submittals on the job site. Do not send in product literature or spec sheets.
4-3 Efficient Irrigation	Optional 5 Points	Specify the source of water and type of delivery here. Do not send in product literature or spec sheets.
5-1 Efficient Energy Use	New Construction – Mandatory	Specify the option chosen from Appendix A including the measures and their parameters that will be installed. For the systems analysis option, additionally attach the software report and an explanation.
5-2 Efficient Energy Use	Rehabilitation – Mandatory	For prescriptive, attach all finished insulation levels and U values of windows and list ventilation, air sealing, and duct sealing. For Simple Payback, attach the energy analysis on each of the mandatory prescriptive measures. For Savings-To-Investment, attach the TREAT analysis and a list of the WX measures.
5-3 Energy Star Appliances	Optional – Up to 5 Points	Specify the types of appliances here that will be Energy Star. Have approved contractor submittals on the job site. Do not send in product literature or spec sheets.
5-4 Efficient Lighting – Interior	Except for Single Family New Construction – Optional – 5 Points	Specify here what type of fixtures and bulbs will be installed and where. Have approved contractor submittals on the job site. Do not send in product literature or spec sheets.

5-5 Efficient Lighting – Common Areas and Exterior	Mandatory	Specify what type of fixtures and bulbs will be installed, where, AND <u>how they will be controlled</u> . Have approved contractor submittals on the job site. Do not send in product literature or spec sheets.
5-6 Electricity Meter	New Construction – Except for Shelters – Mandatory	Specify commitment here and show in cost estimate.
5-7 Additional Reductions in Energy Use	New Construction – Optional – 5 Points for Each 5% Change	Attach analysis using 15% better than WSEC 2006 as a baseline showing 5% increments of increased energy efficiency including indicated measures and their parameters.
5-8 Additional Reductions in Energy Use	Rehabilitation – Optional – 10 Points	Attach the energy analysis identifying specific efficiency improvements meeting the 14-year simple payback that provide greater energy efficiency than the mandatory prescriptive measures.
5-9 Photovoltaic Panels	Optional – Up to 20 Points	Attach the PV plan including size, orientation of array, power output, design parameters and explanation.
5-10 Photovoltaic Ready	Optional – 2 Points	Explain the plan here including orientation, unobstructed exposure, conduit route, and location of terminations.
5-11 Domestic Water Heating	Mandatory	Specify the type of fuel, tank size, energy factor, and standby loss as applicable. Have approved contractor submittal on the job site. Do not send in product literature or spec sheets.
5-12 Domestic Water Heating	Optional – 3 or 7 Points	Specify the type of fuel, type of equipment, and energy rating. Have approved contractor submittal on the job site. Do not send in product literature or spec sheets.
5-13 Solar Water Heating	Optional – 10 Points	Attach the plan for the size and type of solar water heating system including the mounted orientation, the annual performance, how it supplies 50% of domestic hot water, how it was calculated, and SRCC product information.
5-14 Efficient Energy Use – Performance Tested Building Air Sealing	Rehabilitation – Optional – 3 or 7 Points	Specify the category of points chosen and provide performance testing documentation, calculations, and explanation as soon as available. State the estimated date that information will be submitted.
5-15 Efficient Energy Use – Performance Tested Duct Sealing	Rehabilitation – Optional – 10 Points	Specify the commitment to test and provide the performance testing documentation, calculations, and explanation as soon as available. State the estimated date that information will be submitted.

5-16 Efficient Energy Use – Space Heating and Cooling Equipment Replacement	Rehabilitation – Optional – 2, 5, or 7 Points	Specify the category of points chosen, how ducts will be fastened and sealed, what insulation level will be installed, and the option chosen. Specify that only Energy Star equipment will be used or provide the Heat Pump Performance Testing as soon as available. Have approved contractor submittals for equipment on the job site. Do not send in product literature or spec sheets.
5-17 Efficient Energy Use – Document Space Conditioning Savings of 50% or More Compared to National Standards	New Construction – Optional – 17 Points	Attach commitment to meet mandatory requirements of 5-1 including all measures and parameters that apply to this project and provide additional analysis showing what measures will reduce energy use by 50% compared to the 2004 IECC.
6-1 Construction Waste Management	Optional – Up to 5 Points	Specify the method chosen and provide the Waste Management Plan detailing how it will be accomplished.
6-2 Recycled Content Material	Optional – 2 Points for the first 5%, plus 2 Points for each additional 5%, not to exceed 14 Points	Attach calculations for recycled content with explanation as specified in this Criterion that justifies the number of points claimed.
6-3 Certified, Salvaged and Engineered Wood	Optional – 10 Points	Attach the calculation with explanation as specified in this Criterion.
6-4 Water-Permeable Walkways	Optional – 5 Points	Attach Site Map showing all walkways and which ones are water-permeable and the type of material. Clearly label and indicate on the map the areas specific to this criterion.
6-5 Water-Permeable Parking Areas	Optional – 10 Points	Attach Site Map showing all parking areas and the parts that will be water permeable including type of material. Clearly label and indicate on the map the areas specific to this criterion.
6-6 Roofing	Optional – 5 Points	Attach Roof Map showing all roofing areas with the type of roof specified. Clearly label and indicate on the map the areas specific to this criterion.
6-7 Reduce Heat-Island Effect – Paving	Optional – 5 Points	Attach Site Map of all paved areas and the portion that will reduce the heat-island effect and the type of material that will be used. Clearly label and indicate on the map the areas specific to this criterion.

7-1 Low/No VOC Paints and Primers	Mandatory	Specify that all interior paints and primers will be Green Seal certified and have approved contractor submittals on the job site. Do not send in product literature or spec sheets.
7-2 Low/No VOC Adhesives and Sealants	Mandatory	Specify that all adhesives will comply with the most recent version of Rule 1168 of the South Coast Air Quality Management District. Specify here that all caulks and sealants will comply with Regulation 8 Rule 51 of the Bay Area Air Quality Management District. Have approved contractor submittals on the job site. Do not send in product literature or spec sheets.
7-3 Formaldehyde-Free Composite Wood	Optional – 5 Points	Specify that all MDF, particle board, and plywood used in the interior will be urea-formaldehyde free or sealed with Green Seal certified paint or primer if it is not documented to be urea-formaldehyde free. Have approved contractor submittals on the job site. Do not send in product literature or spec sheets.
7-4 Green Label Certified Floor Coverings	Mandatory	Specify that only Green Label Plus certified carpet and adhesive and Green Label certified pad will be used and have approved contractor submittals for these materials on the job site. Do not send in product literature or spec sheets.
7-5 Exhaust Fans – Bathroom	New Construction – Mandatory	Specify Energy Star bathroom fans including how they will be controlled. Have approved contractor submittal for this product on the job site. Do not send in product literature or spec sheets.
7-6 Exhaust Fans – Kitchen	New Construction – Optional – 3 Points	Specify Energy Star kitchen fans that are vented to the outside and have approved contractor submittal for this product on the job site. Do not send in product literature or spec sheets.
7-7 Ventilation	Mandatory	Specify whole-house ventilation according to the WA State Ventilation and Indoor Air Quality Code or 2004 ASHRAE 62.2 here including size of fan, how the size was determined, the location, and how it is controlled. Do not send in product literature or spec sheets.
7-8 HVAC Equipment and Duct Sizing	Mandatory	Attach calculation and explanation of the size of heating and/or cooling equipment including calculation and explanation of the size of ducts if applicable and how these conform to Manuals D, J, & S. Do not send in product literature or spec sheets.

7-9 Water Heaters, Condensing Boilers, Furnaces, and Air Conditioning – Mold Prevention	New Construction – Mandatory	Specify that there will be auxiliary drain pans that drain to the exterior.
7-10 Water Heaters – Minimizing Carbon Monoxide (CO) in the Living Space	Mandatory	Specify that there will be direct power vented or combustion sealed fossil fuel fired water heaters when in the conditioned space. Have approved contractor submittal for this equipment on the job site. Do not send in product literature or spec sheets.
7-11 Cold Water and Hot Water Pipe Insulation	Mandatory	Specify that there will be insulation on hot and cold water pipes as applicable including type and R value.
7-12 Materials in Wet Areas – Surfaces	Mandatory	Specify that there will be smooth, durable, cleanable, water-proof surfaces in wet areas including the type of product and location. Have approved contractor submittal for this equipment on the job site. Do not send in product literature or spec sheets.
7-13 Materials in Wet Areas – Tub and Shower Enclosures	Mandatory	Specify which materials listed in this Criterion for tub and shower enclosures will be used. Have approved contractor submittal for this equipment on the job site. Do not send in product literature or spec sheets.
7-14 Basements and Concrete Slabs – Vapor Barrier	Mandatory	Specify that there will be a 6 mil vapor barrier under interior concrete slabs over 4 inches of gravel. Facilitate inspection by 3 rd party verifier.
7-15 Radon	New Construction – Mandatory	In high risk radon counties, specify here the list of radon mitigation measures that will be installed.
7-16 Radon Testing	Existing Buildings – Mandatory	In high risk radon counties, specify here that radon testing using the EPA protocols will be done and state type and duration of test.
7-17 Radon Mitigation	Rehabilitation – Mandatory	If radon testing shows 4 pCi/L or higher, specify here the radon mitigation measures that will be installed.
7-18 Water Drainage	Mandatory	Specify that drainage of water away from buildings and proper waterproofing and flashing will be installed and list every applicable instance as stated in the criterion. For all new windows and doors, specify that they will be installed with pan flashing.
7-19 Garage Isolation	Mandatory	Specify that there will be a continuous air tight barrier between the living space and an attached garage, how it will be achieved, and the number and placement of CO monitors as necessary.
7-20 Clothes-Dryer Exhaust	Mandatory	Specify that clothes dryers will be exhausted to the exterior.
7-21 Integrated Pest Management	Mandatory	Specify that sealing of all penetrations will be done and include what materials will be used to prevent pest or rodent entry.

7-22 Lead-Safe Work Practices	Rehabilitation – Mandatory	State the year when the buildings were constructed. For structures built before 1978, specify that lead-safe work practices will be followed.
7-23 Healthy Flooring – Alternative Sources	Optional – 5 Points	Specify that no vinyl or carpet floor coverings will be used.
7-24 Whole House Vacuum – Reducing Dust	Optional – 2 Points	Specify that a whole-house vacuum system with HEPA filtration will be installed. Do not send in product literature or spec sheets.
8-1 Owner's Manual	Mandatory	Submit this to your HTF Contract Manager before completion, or before contracting if your project includes rehab without relocation. State here estimated date of submittal.
8-2 Occupants' Manual	Mandatory	Submit this to your HTF Contract Manager before completion, or before contracting if your project includes rehab without relocation. State here estimated date of submittal.
8-3 Homeowner and New Resident Orientation	Mandatory	Keep a record of who in each household received the orientation and when they received it for review by the HTF site monitor.